Registering Renewal Applications

1. Policy

A renewal of KidsCare eligibility is required at least once every twelve months.

2. Process for Registering Renewals

The registration process for registering renewals includes:

- Identifying cases due for renewal
- Receiving, tracking and assigning Renewal Applications
- Registering the information in ACE
- Completing system checks

3. Identifying Cases Due for Renewal

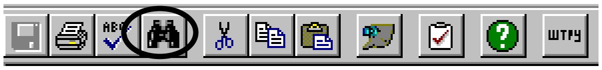
The process of identifying cases due for renewal is automated in ACE. ACE takes the following actions to identify cases due for renewal.

1. ACE puts cases into renewal status two months prior to the renewal due month.
2. ACE moves cases from Active cases to Renewal cases on the **"Work Management"** window.
3. ACE generates a Renewal Cover letter and Renewal Application Form to the customer. The cover letter and Renewal Application that is produced depends on if it is the first or second renewal notice.
4. ACE keeps renewal cases in renewal status until the case is dispositioned specifically as a renewal month.

4. How to Receive, Track and Assign Renewals

Take the following actions to track and assign Renewal Applications:

1. Receive the paper Renewal Application Form from the customer.
2. Click the binoculars button to find the customer's name in ACE. The **"Find Person"** window appears.

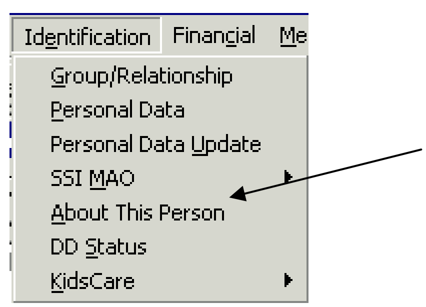


3. Enter the following information for the customer on the **"Find Person"** window:

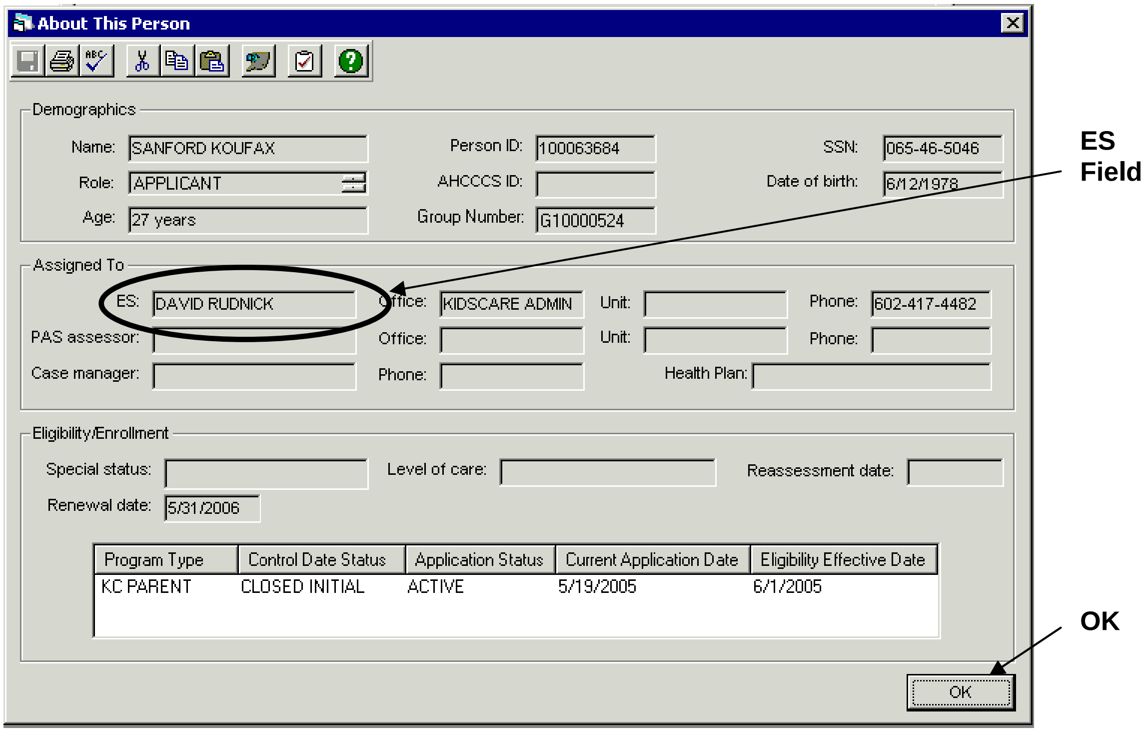
- **SSN;**
- **Last Name;**
- **First Name; and**
- **Date of birth.**

After clicking the **“Search”** button, ACE then performs a comprehensive search to locate the customer you have entered.

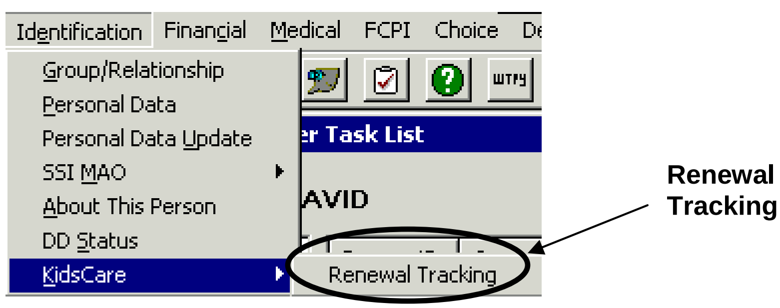
4. When the customer’s name appears, highlight the person with the information that matches the data you entered.
5. Click the **“Select Person”** button on the **“Find Person”** window. This closes the window and the search is now complete for your customer name.
6. You will need to determine whose caseload the case is currently in before the renewal can be assigned. This can be found on the **“About This Person”** window. To access the **“About This Person”** window:
   - Click on “Identification” on the menu bar.
   - Then, select **“About This Person”** from the drop-down list.



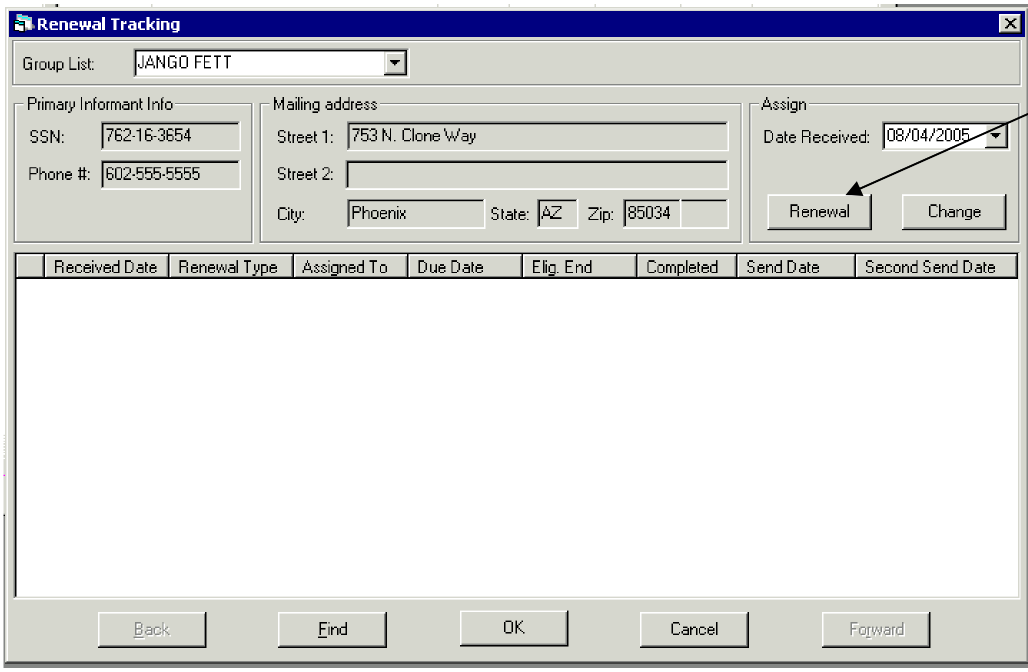
7. The worker who the case is assigned to can be found in the **“ES”** field. After getting this information, click **“OK”**.



8. Renewal Applications are tracked on the **"Renewal Tracking"** window. To access the **"Renewal Tracking"** window:
   - Click on **"Identification"** on the menu bar.
   - Then, select **"KidsCare"** from the drop-down list.
   - Finally, select **"Renewal Tracking".**



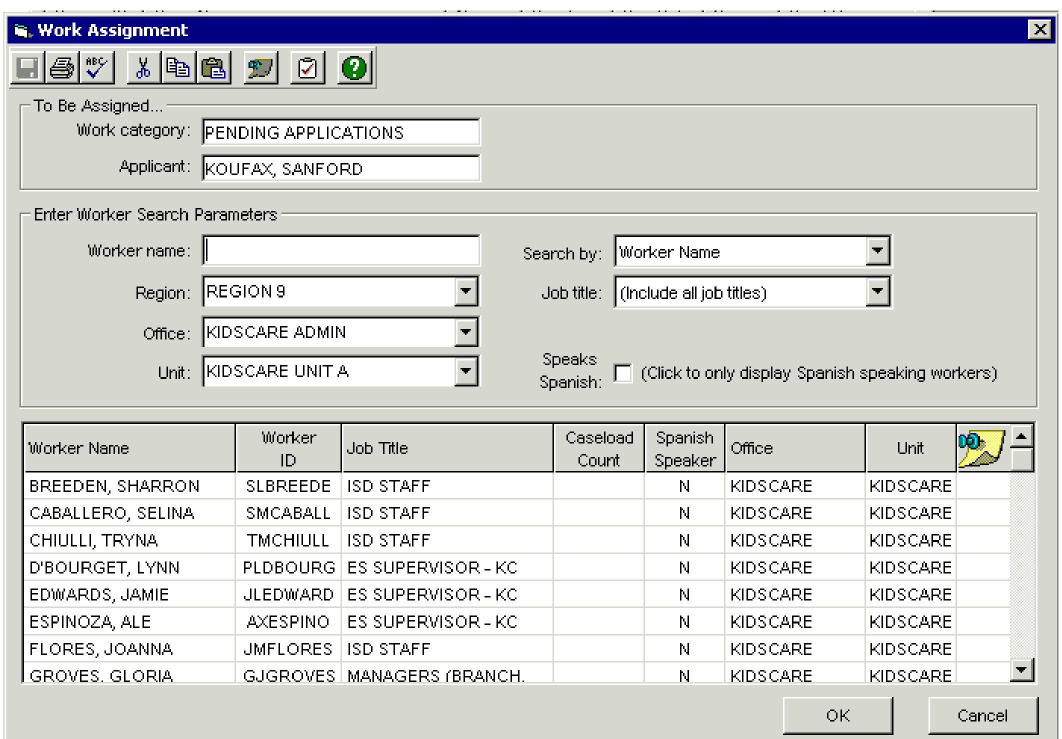
9. Enter the date the Renewal Application is received in the **"Date Received"** field.
10. Click the **"Renewal"** button.



Renewal Button

This takes you to the **'"Work Assignment"** window.

11. On the **"Work Assignment"** window, the assignment defaults to the KidsCare Office to bring up the KidsCare workers only.



12. Assign the case to the Dispatcher Caseload when the case in a vacant caseload.

On the **“Work Assignment”** window:

- Type the name of the Eligibility Specialist that you want to assign the case to in the **“Worker Name”** field.
- Highlight the name in the grid to populate the other fields.
- Click **“OK”** to save the assignment and close the window. This returns you to the **“Renewal Tracking”** window.
- Click **“OK”** on the **“Renewal Tracking”** window.

5. How to Register Renewal Applications

After you log the receipt of the Renewal Application on the **“Renewal Tracking”** window and assign the case on the **“Work Assignment”** window, take the following actions to register Renewal Applications in ACE.

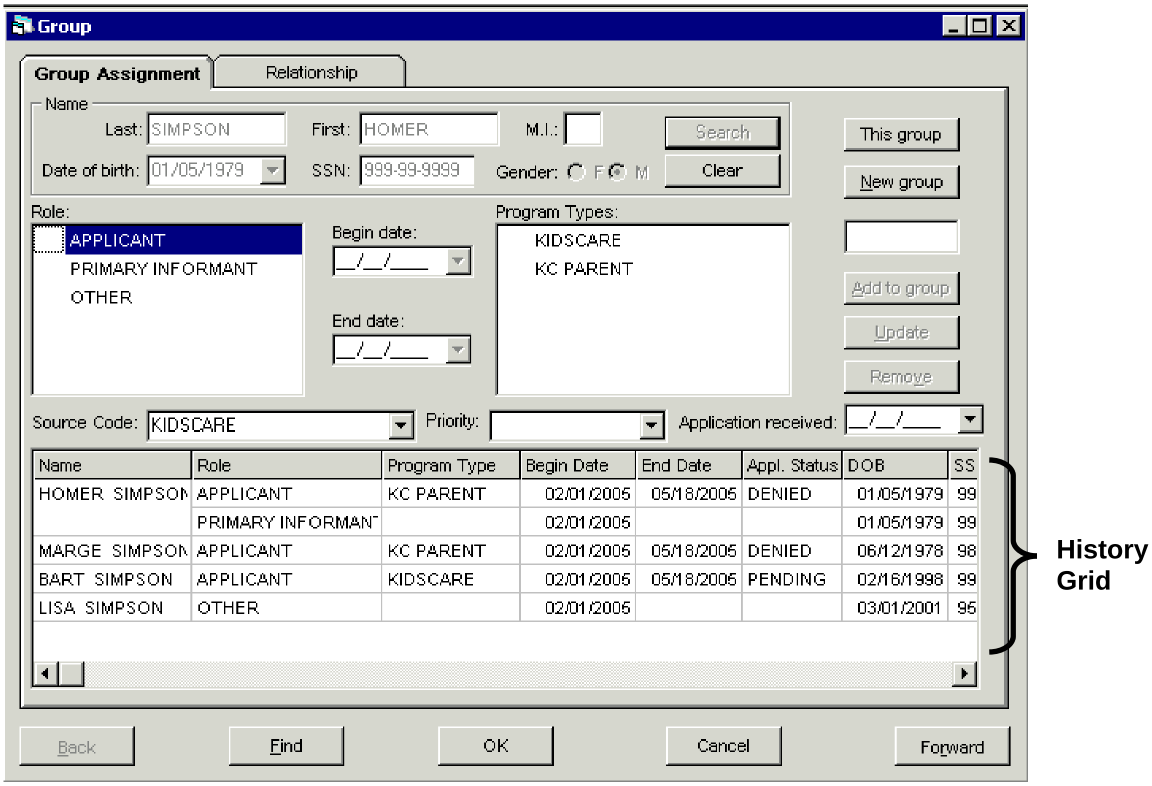
a) Control Date Window

1. Click on **“Financial”** on the menu bar. Select **“Control Date”**. This takes you to the **“Control Date Summary”** window.
2. Click the **“New”** button. This will bring up the **“Control Date Creation”** window.
3. The date in the “Month” field should be the first of the month of the renewal application date.
4. Select **“Renewal”** from the **“Type”** dropdown field and click **“OK”**.
5. This will take you back to the **“Control Date Summary”** and create a renewal control date. Click **“OK”**.

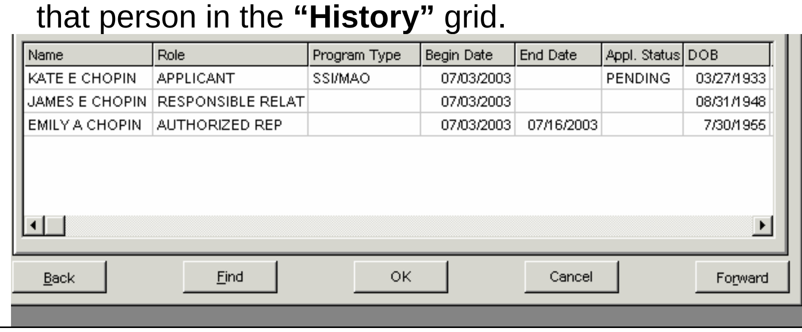
b) Group Assignment Window

1. Click on **“Identification”** on the menu bar. Select **“Group Relationship”**. This takes you to the **“Group Assignment”** tab on the **“Group”** window.

   When the **“Group”** window appears, you will see the customer’s information from the initial application in the history grid in the bottom section of the **“Group Assignment”** tab.



2. Review the Renewal Application and the information in the history grid to see if you need to add any group members.

If you need to…	Then…
Add a new member to the group	See the Registering Initial Applications Chapter and the section on **"How to Add a Person to an Existing Case"**. **Note:** Name changes are completed in the **"Personal Data"** section on the **"Demographic"** tab.
Remove a non-applicant member of the group	• Click on the name of the person you want to remove. • Enter the **"End Date"** that represents the date the person stops being a member of the group. • Click the **"Update"** button. The end date appears for that person in the **"History"** grid. 

3. Review the Renewal Application with the information in the history grid to see if any existing group members have changed roles.

If you need to…	**Then…**
Change roles for a non-applicant group member	• Click on the name of the person. • Check the new **"Role".** • Enter the **"Begin Date"** for the new role. • Click **"Add to Group"**. The history grid now shows two roles for the same person.
End a role for a non-applicant group member	• Click on the name of the person. Make sure you select the role that you need to end. This activates the **"Update"** and **"Remove"** buttons. • Type in the **"End Date",** which is the date the person stops acting the role. • Click the **"Update"** button. The end date appears in the history grid for the person and role you selected.
Changing a non-applicant to an applicant	• Click on the name of the person. • Check the role **"Applicant".** • Enter the **"Begin Date"** for the new role. • Click **"Add to Group"**. • Remove the old role (table in Step 2). The history grid now shows the role of applicant for the same person.

4. If there is no add-on to the household, click **"OK"** and skip to the system checks; or click **"Forward"** to save and close the information and travel the standard path.

c) Demographic

1. Before reviewing the information on this window, ensure that the information you are reviewing is for the correct group member.

   All members known to a particular group are displayed in the **"Group List"** field. Click the drop-down arrow for **"Group List"** and select the person for whom you need to review information.

If you…	**Then…**
Need to change the person's name	• Delete the name you need to change; • Type the new name in the **"Last Name"** and/or **"First Name"** field. • Select the **"Yes"** radio button under "**Name Change"**. • Go to step 2.

Do not need to change the person's name	Go to step 2.

2. Review the following information to make sure it is still correct:
   - **Marital Status;**
   - **Language; and**
   - **Pregnancy.**

   Change any information that needs to be changed.

   - Click **"Forward"** to travel the standard path passed the **"Relationship"** tab on the **"Group"** window to the **"Address"** tab in the **"Personal Data"** section.

d) Address

1. When the **"Address"** tab appears, make sure the correct group member's window is displayed. Review the Renewal Application with the information in the **"Residence Address"** field to make sure it is the same.

If you …	**Then…**
Need to change the **"Residence"** address	• Delete the **"Residence"** address that you need to change. • Type the new **"Residence"** address in the "Residence" address field. • Continue to step 2.
Do not need to change any information	Continue to step 3.

2. If the residence address is the same as the mailing address, click **"Copy residence to mailing"**.

   Then use the **"Copy residence to household"** and **"Copy mailing to household"** function to update the address for the entire household.

3. Click **"OK"** to save the information and close the window.

6. How to Complete System Checks

Complete system checks in PMMIS and AZTECS to determine any other open eligibility or change in demographic information.

Take the following actions to complete the system check search in:

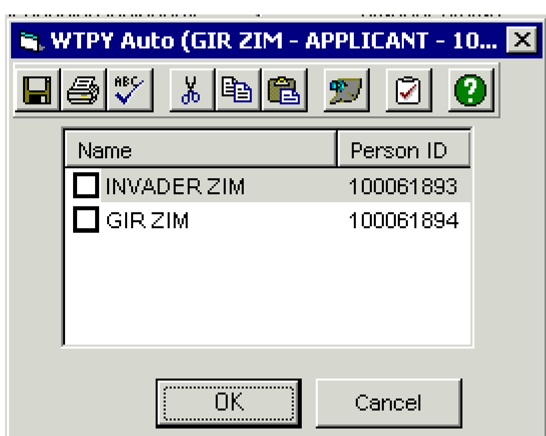
- PMMIS (steps 1-2); and
- AZTECS (steps (3-5).

Step	Window	Action
1	RP290	Search by name, birth date and sex of each applicant.
2	RP145	On the AHCCCS-Recipient Menu: Enter selection: **01.** Tab to **Alternate ID** field. Type in applicant's **SSN**. Press "ENTER". Search for any AHCCCS programs for which the applicant is currently eligible or was previously eligible.
3	CLIN	Search by name, birth date and SSN to see if any of the applicants are known to AZTECS. Enter the AZTECS case number in the Codes index in Fortis.
4	CAP-1	Search for address information.
5	CAP-2	Search for case history at DES.

7. Requesting a WTPY

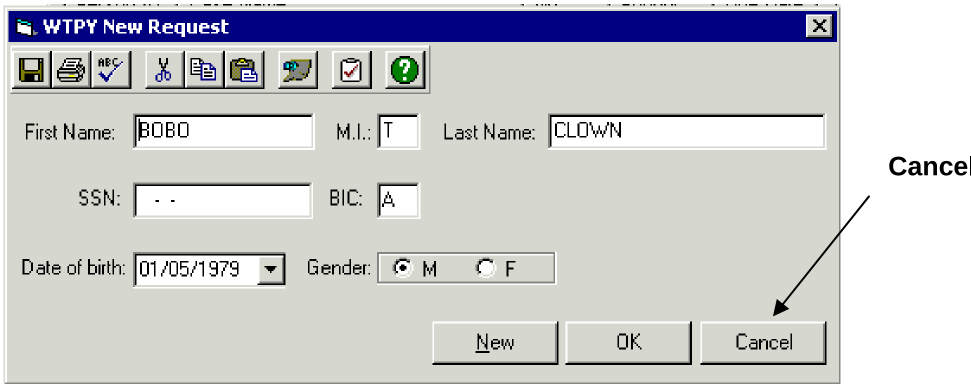
Take the following actions to order a WTPY.

1. On the **"Icon Toolbar"**, click on the **"WTPY"** button. A pop-up window appears displaying the names of the group participants.



2. Click on the box next to the customer's name for which you are ordering a WTPY.
3. Click **"OK".** This closes the pop-up window and orders the WTPY.

4. If the customer does not have a Social Security Number, the pop-up window **"WTPY New Request"** appears. Click **"Cancel"** to continue on.



5. If a WTPY request already exists, a dialogue box appears with that message. Click **"OK"** if you receive a message that tells you that a WTPY request already exists.